



24 Jan.2022

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,617	(0.8) %	18.5 %
BSE SENSEX	59,037	(0.7) %	18.0 %
CNX BANK	37,574	(0.7) %	11.0 %
CNX MIDCAP	30,564	(2.4) %	26.7 %
CNX SMALLCAP	11,417	(2.3) %	37.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,265	(1.3) %	(5.7) %
S&P 500	4,398	(1.9) %	(7.7) %
FTSE 100	7,494	(1.2) %	(0.1) %
HANG SENG	24,966	0.1 %	7.3 %
NIKKEI	27,522	(0.9) %	(6.1) %
SHANGHAI COMPOSITE	3,523	(0.9) %	(3.0) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	0.0 %	(0.1) %
EUR/USD	1.13	(0.0) %	(0.3) %
GBP/USD	1.36	(0.4) %	0.3 %
USD/JPY	113.78	(0.4) %	(1.2) %
USD/AUD	1.39	0.7 %	1.1 %
USD/SGD	1.35	(0.1) %	(0.3) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	1.7 %	12.9 %
Gold(INR/10g)	48,458	(0.2) %	0.6 %
Gold Comex(USD/oz)	1,838	(0.3) %	1.3 %
SILVER(INR/1Kg)	64,656	0.5 %	4.1 %
Aluminium(USD/MT)	2,806	(8.9) %	(0.3) %
Copper(USD/MT)	9,692	(2.8) %	0.3 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	1.8	(0.0) %	0.2 %

**Global Economy:** The US Treasury Secretary Janet Yellen said Joe Biden administration was seeking strategies to ease inflationary pressures and rebranded its economic agenda as modern supply side economics to increase labor supply, infrastructure, education and research. The European Central Bank (ECB) President Christine Lagarde has rejected calls for the European Central Bank to raise interest rates more quickly than planned in response to record inflation and warned that raising interest rates too soon risked putting the brakes on growth. UK retail sales fell 3.7% on a monthly basis in December, reversing the 1% increase a month ago, data from the Office for National Statistics showed Friday. This was the biggest decline since January 2021. Likewise, sales volume excluding auto fuel decreased 3.6% after rising 0.7% in November. Non-food store sales declined sharply by 7.1% in December and food-store sales were down 1% from the previous year. Year-on-year, retail sales decreased 0.9%, in contrast to the 4.3% increase seen in November. UK consumer confidence fell in January amid inflation concerns, rising fuel bills, and interest rates. The GfK Consumer Confidence indicator dropped to its lowest level in 11 months at minus 19 in January, as consumer mood was dampened by persistently high inflation, suggesting that rising living costs will slow the household spending recovery. This followed a reading of minus 15 in December. Japan's overall consumer prices climbed 0.8% on year in December, the Ministry of Internal Affairs and Communications said on Friday, up from 0.6% in November. Core CPI, which excludes volatile food prices, was up an annual 0.5%. Individually, prices were up for food, housing, fuel, clothing, education and recreation; they were down for furniture, medical care and communications. On a seasonally adjusted monthly basis, overall inflation and core CPI both were up 0.1%.

**Global Equities:** The US stocks tanked yet again on Friday with major losses extending recent selling spree. DOW fell 1.30%

**Indian Economy:** Better fiscal management and improved market liquidity can help states to reduce their cost of borrowing, the Reserve Bank Of India (RBI) stated in a latest research paper. RBI Working Paper titled States' Fiscal Performance and Yield Spreads on Market Borrowings in India, authored by Ramesh Jangili, N.R.V.V.M.K. Rajendra Kumar and Jai Chander constructs a composite index of States' fiscal performance and examines if the constructed index can help in explaining the State Development Loan (SDL) yield spreads. Key fiscal parameters viz., deficit, debt, expenditure quality, revenue mobilisation efforts, and market liquidity of SDLs are considered for the composite index.

**Equity Markets:** The domestic equity benchmarks ended with significant cuts after a weak session on Friday. The Nifty closed below the 17,650 mark. Shares across sectors declined with consumer durables, PSU banks, oil & gas, IT and realty losing the most.

**Corporate News:** Reliance Industries reported sharply higher consolidated profit at Rs 20,539 crore in Q3FY22 against Rs 14,894 crore in Q3FY21, revenue rose to Rs 2,09,823 crore from Rs 1,37,829 crore YoY. The company said it delivered a landmark quarter posting all time high revenue and Ebitda as operating environment returned to normalcy. Vodafone Idea reported a loss of Rs 7,230.9 crore in Q3FY22 against loss of Rs 7,132.3 crore in Q2FY22, revenue rose to Rs 9,717.3 crore from Rs 9,406.4 crore QoQ. Bandhan Bank reported higher profit at Rs 859 crore in Q3FY22 against Rs 632.6 crore in Q3FY21, net interest income rose to Rs 2,124.7 crore from Rs 2,071.7 crore YoY.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(617.9)	(90.6)	(24.8)
MF(INR cr)	1,390.3	394.9	548.4

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	73,303	46,630	66,220
F&O(INR cr)	5,969,511	8,894,790	6,179,176

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.9	0	18.6
NSE VIX	18.9	17.4	16.6

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	37,574	(0.7) %	11.0 %	Energy	25,056	(0.8) %	35.3 %
IT	36,055	(1.7) %	38.8 %	Pharma	13,243	(1.6) %	7.0 %
Metals	5,720	(1.9) %	36.5 %	Finance	18,047	(0.5) %	13.4 %
Auto	11,562	(0.2) %	15.4 %	PSU	2,710	(3.1) %	22.3 %
FMCG	36,813	0.4 %	5.6 %	Real Estate	491	(2.4) %	46.3 %

## NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Biocon	377	3.5 %	(8.1) %	Bajaj Fins	16,335	(5.4) %	66.9 %
Bajaj Auto	3,420	3.4 %	(8.6) %	Havells In	1,242	(5.2) %	17.3 %
Hind. Unil	2,325	2.8 %	(3.1) %	Info Edg.(	4,763	(4.9) %	11.7 %
Maruti Suz	8,190	1.9 %	18.3 %	H P C L	311	(4.5) %	30.7 %
Hero Motoc	2,750	1.5 %	(7.0) %	Tech Mahin	1,594	(4.4) %	60.6 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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